

Conducting a SWOT or SCOT Analysis (Organizational Strengths, Weaknesses or Challenges, Opportunities and Threats)

Step 1: Have your external and Internal Environmental Scan information ready and organized. This will provide your SWOT analysis team the basis for its work.

Step 2: Invite Participation

Likely participants in your SWOT analysis will include stakeholders you want to feel invested in your planning process, and resource people who will have helpful perspectives and high quality analysis to offer. HR staff both internal to your department and from the Department of Human Resources may be strong contributors. Consumers, contractors, vendors, budget and finance staff are all possibilities. You don't need a lot of people. Just the right people.

The SWOT Analysis Template

The end product of a SWOT Analysis is a SWOT Matrix. Use the “**SWOT Analysis Template**” to record the Strengths, Weaknesses, Opportunities and Threats of your organization.

Checklist for a Successful SWOT Analysis

1. Be **realistic and honest** about your organization's strengths and weaknesses.
2. Remember, a SWOT analysis is **subjective**.
3. A SWOT Analysis distinguishes between where your organization is **today**, and where it could be in the **future**.
4. Keep your SWOT **specific**. Avoid grey areas. Stay focused on the topic being analyzed, in this case, the workforce.
5. Keep your SWOT **short and simple**. Avoid complexity and over-analysis.

Strengths and weaknesses are usually considered to be internal to your agency, while opportunities and threats are usually considered external factors. You are likely to find your group in lively discussions about whether, for example, the legislature is internal or external. Normally, for these purposes, anything within your agency is internal, and anything outside your agency is external.

SWOT Analysis Template

| | Positives | Negatives |
|------------------|---|---|
| Internal Factors | Strengths | Weaknesses (Challenges) |
| | (e.g. strong staff morale; good training program; long-term staff with good history and experience; low turnover) | (e.g. many long-term staff ready for retirement; low wages; no rewards program; low turnover) |
| External Factors | Opportunities | Threats |
| | (e.g. technology school down the street just added a curriculum in one of skill needs; economic downturn results in skilled available applicant pool) | (e.g. economic downturn results in reduced tax dollars/hiring freeze) |

Step 3: Gather input from your participants

To gather input from your participants on the strengths, weaknesses, opportunities and threats your organization faces, you will need to provide to them the information from your environmental scan, and the SWOT Matrix (above).

1. Send them the environmental scan results and a blank copy of the SWOT Matrix, by email or hard copy, in advance so they can become familiar with the material.
2. Design a web-based survey to collect their feedback on line (Zoomerang, Survey Monkey, etc. Assure your participants anonymity in order to obtain the frankest results.
3. If a web-based survey is not possible or appropriate for your participants, you can either:
 - a. Collect their responses in hard copy and compile; or
 - b. Simply have them consider the advance material, and facilitate the entire input process when you bring your participants together for the analysis meeting (see the Step 4)
4. Compile the information. The web-based survey will be the easiest, providing you a spreadsheet with the responses compiled. An email survey will allow you to copy and paste responses into a comprehensive matrix. Hard copy responses will require time-consuming data entry, but are important to use if key respondents lack computer or web access. You might also consider literacy and language barriers as you determine your approach. Do not rule out interviews.

If you decide to collect this input at the Analysis meeting (step 4), do so for all participants. Do not survey some in advance and not others. If you must use more than one survey approach, do so.

Step 4: Conduct a SWOT Analysis Meeting

The SWOT Analysis Meeting can take on two different qualities, depending on your need. If you are unable to collect participants' SWOT responses in advance, then your Analysis Meeting will have two parts:

- A. Generating Strengths, Weaknesses, Opportunities and Threats based on the environmental scan data generated and distributed in advance; and
- B. Analyzing the information and generating strategies and priorities for to address your organization's workforce needs in the future.

Ensure you have set enough time for the meeting. With six to ten people and little discussion, three hours may suffice. You may want a full day, or two half-days, to complete the process of establishing priorities.

Activity 1: Review each of the SWOT areas – adding items to or subtracting items from the list. Encourage questions to clarify. Look for items in each box that could be combined, or that need to be fleshed out.

You will likely spend from ten to 30 minutes on each area, Strengths, Weaknesses, Opportunities, and Threats, depending on the number of people in the room and the level of discussion.

Sample Survey Questions for a Web-based, Email or Hard Copy Workforce SWOT Participant Survey

Identifying Strengths, Weaknesses, Opportunities and Threats in Workforce Planning

Our organization needs your help in planning for the changes occurring in our current and future workforce. Please identify our organization's Strengths, Weaknesses (or Challenges), Opportunities and Threats as they relate to workforce planning. This type of planning tool is often referred to as a SWOT Analysis. Please review the environmental scan information we sent to you in advance, prior to completing this survey.

Workforce planning is a systematic approach to identifying the staff (workforce) required to meet an organization's goals and developing the strategies to meet these workforce needs. This includes the kinds of skills our staff will need, the number of staff we will need, etc.

Your name will be kept confidential and no responses will be attributed to you.

1. What are the strengths of our organization related to the workforce? (Strengths are internal factors or attributes of the organization that help it to achieve its goals and objectives.)
 - a.
 - b.
 - c.
 - d.
 - e.
 - f.
 - g.
 - h.
2. What are the weaknesses of our organization related to the workforce? (Weaknesses are internal factors or attributes of the organization that may hinder or prevent the organization's ability to achieve its goals and objectives.)
 - a.
 - b.
 - c.
 - d.
 - e.
 - f.
 - g.
 - h.
3. What opportunities are available to the organization, related to the workforce? (Opportunities are external factors or conditions that have the potential to help our organization to achieve its goals and objectives.)

- a.
 - b.
 - c.
 - d.
 - e.
 - f.
 - g.
 - h.
4. What threats exist related to the workforce in our organization? (Threats are external factors or conditions that have the potential to hinder or prevent our organization from achieving its goals and objectives.)
- a.
 - b.
 - c.
 - d.
 - e.
 - f.
 - g.
 - h.
5. Thank you for participating in this survey. Do you have any additional comments about the challenges of a changing workforce or workforce planning that you would like to share?